

Creating a Training Guide for First-time Bluebeam 2018 Users

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The use of technology is constantly increasing in the construction industry. Bluebeam is commonly used in both industry and the Cal Poly Construction Management program. The goal of this project based project is to create a training guide for first time Bluebeam users. The guide takes users through the steps of opening the program, becoming accustomed with the user interface, and step by step through a basic takeoff to the submission stage.

Key Words Bluebeam, BIM, Estimating, pdf, Quantity Takeoff, QTO

Introduction

This project originated from necessity. There are two goals to this project. The first, and main goal of this project, is to provide a resource to new Bluebeam users. The second goal of this project is to create reference material for people who are upgrading from Bluebeam 2017 to Bluebeam 2018. Bluebeam has undergone a huge user interface redesign in 2018, and might be confusing to new users. However, the main goal is truly the focus of the project. The idea came from experience in the CM department and the construction industry. In previous quarters in the CM department I have taught a lesson in the residential construction class. In this lesson I would go over how to do a construction takeoff from the point where you open the program to submitting it for grading. As I am graduating I will no longer be able to teach this lesson. Thus, I created this training guide. Additionally, I wanted to create a resource for those in industry who are not extremely computer literate.

Process

Inception

The first thing that happened in the process was the inception of the idea. Then, I worked to formulate a full-on plan, which would require approval from two individuals in the Construction Management Program. In formulating this plan, I looked at what was taught during the previous quarters. Then I analyzed what should continue to be taught and what could be improved on. I then found a SME for the project and got their approval. After getting SME approval, I got approval from the Construction Management senior project director. After this I could begin the project.

Project Start

After I received the necessary approval I began the project. The first step was to get Bluebeam 2018. I had the 2017 version but due to the redesign I would need to get the newer version. The software is expensive so it was necessary to devise a plan to collaborate with Bluebeam. I emailed their student outreach contact, Emily Heppard with a request for software and an outline of my project. After exchanging a few calls, we decided to have a meeting over the phone. We discussed the goals for the project and agreed that it was necessary to have the new software. Later that day she emailed me a product license. Emily also took an interest in my project. She had requested that I send it to upon completion. After I got the license I got started on creating the project. This was a task that I did not think

would take too long initially. I finally realized the scope of the project after I had sunk the first eight hours into the project. At that point I was approaching twenty five percent completion with the project based part of the project. After a couple of meetings with my SME, I was on my way. I started the project in a word document. I meticulously explained how to complete each of the steps I was taking. I then found that was not going to be sufficient, so I added screenshots of my progress to the document. I then decided to annotate some screenshots to help convey the information more clearly. I then found that I would need to a a couple of videos to explain the first couple of actions as a new user might be completely lost.

Final Deliverables

The project ultimately delivered a forty eight page step by step Bluebeam user guide that went over the following topics:

- Basic Overview
- Navigation
- Left Panel
- File Access
- Thumbnails
- Bookmarks
- Layers
- Tool Chest
- Links
- Spaces
- Properties
- Measurement
- Forms
- Signatures
- Flags
- Sets
- Search
- Studio
- Takeoffs20
- Extracting Drawings
- OCR
- Scaling
- Deleting Markups
- Area Measurements
- Editing a Quantity
- Tools
- Linear Measurements
- Layer Creation
- Counts
- Legends
- Flattening and Submitting

Lessons Learned

I learned much more through this project than initially expected. I thought that it would be a quick project but I was quickly surprised. It took much longer than I had anticipated. One of the biggest things was learning the new Bluebeam 2018 redesign. Thankfully, I learned this while in school as I will be now more prepared for the workplace. I, also learned a few new things about efficient workflows when trying edit screen capture videos.